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CONDUCTING A NEEDS ASSESSMENT OF SENIOR POPULATIONS

A HANDBOOK FOR COMMUNITY COLLEGE PLANNERS

Province of British Columbia
Ministry of Advanced Education and Job Training

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CONDUCTING A NEEDS ASSESSMENT OF SENIOR POPULATIONS

A HANDBOOK FOR COMMUNITY COLLEGE PLANNERS

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for the

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Ministry of Advanced Education and Job Training

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SECTION I: INTRODUCTION

SECTION I: INTRODUCTION

BACKGROUND

This handbook evolved from a cooperative community needs assessment project undertaken by Camosun College and North Island College, on Vancouver Island, B.C. Although the colleges differed in terms of the regions served - Camosun, centralized and serving a large urban community; North Island, decentralized and serving several small town and rural communities - they shared a common interest and concern in responding to the present and changing needs of their expanding senior populations.

Camosun and North Island College jointly identified a community needs assessment as an important step that would generate comprehensive data and give direction in the planning and implementation of services and programs relevant to the needs of seniors. In essence it would help the colleges competently serve the senior populations to which they are accountable.

PURPOSE

The purpose of this handbook is to provide educational planners with a practical guide to use in developing and conducting a needs assessment for senior populations in large and small communities. It is designed to be utilized as an aid and resource by post-secondary institutions, especially health related, social service and community education departments.

The objectives of the handbook are to:

1. Describe the phases of planning, conducting and analyzing a community needs assessment of senior populations.

2. Describe the procedure and format involved in each phase of the community needs assessment.

3. Identify similarities and differences relevant to conducting community needs assessment of senior populations.

4. Identify the potential problems of conducting needs assessments of senior populations.

(Financial assistance for this project was made available by the Ministry of Advanced Education and Job Training.)

This handbook is designed to be readable, relevant and practical (it is also user-friendly!). The body of the handbook is divided into five sections:

1) **Introduction**

2) **Overview of The Needs Assessment Model**

3) **Planning and Conducting a Community Needs Assessment of Senior Populations**

4) **Practical Points To Consider From A Planner's Perspective**

5) **Summary**

Additional information such as guidelines for the selection of appropriate methodology, designing questionnaires, establishing an advisory group and college case studies are included in the appendices.

SECTION II: NEEDS ASSESSMENT MODEL: AN OVERVIEW

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Before one delves into the many challenges of a seniors' needs assessment, it is important to sit back and get a sense of the 'big picture'. This section gives an overview of the concepts and theoretical framework described in the needs assessment literature. It should be a helpful review for most college planners, and provide a sound conceptual base and a practical approach to planning and conducting a needs assessment.

There are many meanings given to the concept of "needs", and there are numerous ways of assessing them. This section focuses on the common definitions of needs and needs assessment as described in the literature. It also presents a simple needs assessment model derived from educational theory and tailored or adapted to serve as a practical framework for a "community focus" to needs assessment.

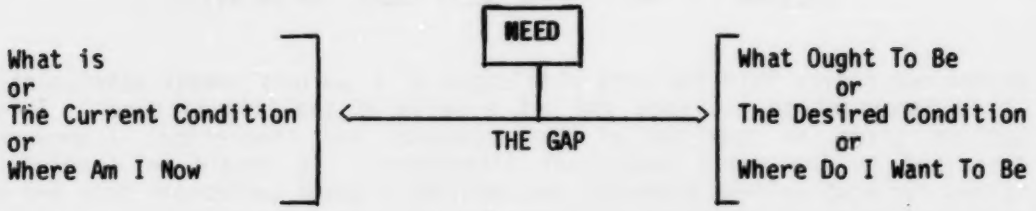
It is important, but not always practiced, that relevant educational programs should be based on needs assessment. Program developers will often formulate programs based on what they think to be identifiable needs of the learner. When this approach is used, a program is developed that may meet the needs of the educator or institution rather than that of the learner. Subsequently, the program's desired goals of meeting the needs of the learner are not realized.

What are needs and how does one go about assessing them?

A need has been defined as a condition or situation in which something necessary or desirable is required or wanted. The term is often used to express the deficiencies of an individual or some category of people either generally or in some set of circumstances. A need may be perceived by the person or persons possessing it (when it may be called a felt need) or by some observer (when it may be called an ascribed need) (Houle, 1973, p. 233).

A practical definition of need can be provided by placing it in an educational framework. An educational need is a need that can be satisfied by means of a learning experience. It is considered to be a lack, deprivation or deficiency that tells one what to do from an educational perspective or viewpoint. By implication, then, there are other needs that cannot be met through educational experiences (Atwood, 1971, p. 212).

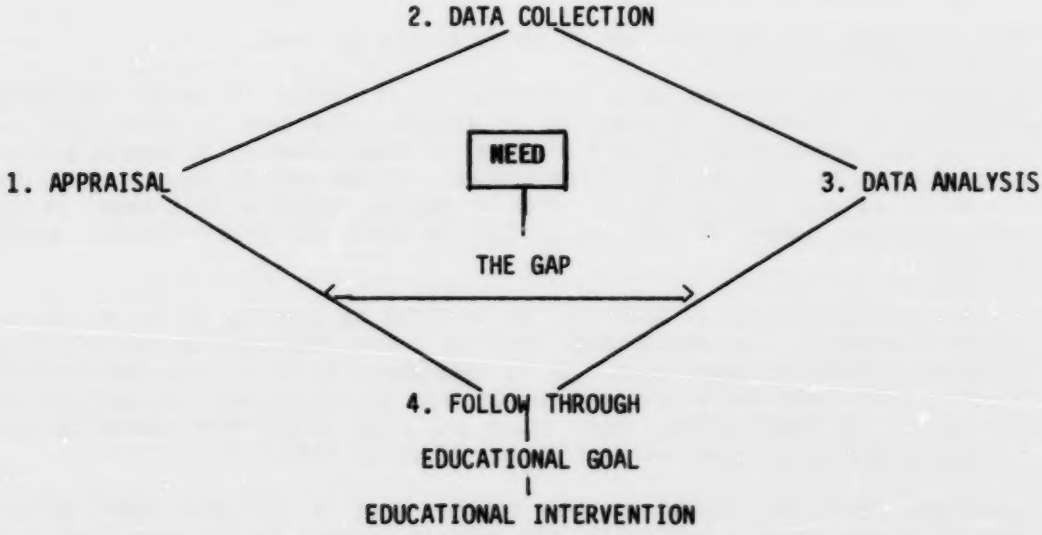
Sometimes needs are viewed as gaps between what is and what ought to be. When this gap, or more precisely, the need it represents, is described, the educational planner restates it as an educational goal and ultimately transforms the goal into educational interventions (e.g. programs, services). A need can be visualized as follows:



Needs assessment is a systematic way of ascertaining the learning needs of individuals in order to establish educational goals. This systematic approach involves a process of assessment, data collection and analysis. Using multiple methods of data collection that include the learner and expert opinions is generally considered to be the best approach to needs assessment.

SYSTEMATIC NEEDS ASSESSMENT

A simple paradigm that relates needs and needs assessment is illustrated below:



Needs assessment strategies require that an educational planner

1. Establish a structure or group for conducting the assessment
2. Determine the potential sources of information
3. Select appropriate procedures for collecting and analyzing this information.

According to Knowles (1970) information can be obtained from:

1. The potential participants or the individual target group.
2. Mass media, commentaries, news stories.
3. Organizations, community surveys and polls.
4. Advisory committees, consultation with community leaders or problemsolving groups.
5. People in helping roles with the individuals.
6. Professional literature, reports, studies, social analysis.
7. Informal conversations.

There are many useful models for conducting a needs assessment. The model detailed below is an eclectic one based on the literature and balanced with the practical experience of the community college planner (Knowles, 1970; Knox, 1977). The application of this model to planning and conducting a seniors' needs assessment is covered in Section III.

A NEEDS ASSESSMENT MODEL

PHASE ONE - PRE ASSESSMENT		
STEPS	TASKS	QUESTIONS TO ASK
D E F I N E A N D A P P R A I S E	. Establish an organization or advisory group. (See Appendix III.)	. Who are the appropriate resource people in our community?
	. Define objectives of needs assessment.	. What is the purpose and focus of the needs assessment? (e.g. the problem).
	. Identify target population.	. What and why do we want or need to know and how will the information be used?
	. Identify sources of data.	. Whose needs do we want identified?
	. Select appropriate methodology.	. How can we find their needs and interests (e.g. through other people?).

A NEEDS ASSESSMENT MODEL

PHASE ONE - PRE ASSESSMENT		
STEPS	TASKS	QUESTIONS TO ASK
D E F I N E A N D A P P R A I S E (continued)	. Develop a conceptual plan for design and implementation.	. Does some information already exist? . Who/what are the resources in the community? . What techniques are suitable for collecting existing information? . What techniques or approaches can be used to collect new information? . What are the advantages and disadvantages of the various methodological approaches? . What techniques are the best ones to obtain the data? . What costs are involved in terms of people and resources (design expertise, clerical support, computer analysis, research assistant, project coordinator, etc.)

A NEEDS ASSESSMENT MODEL

ASSESSMENT		
STEPS	TASKS	QUESTIONS TO ASK
C O L L E C T	. Design data collection tools or instruments. . Pretest instruments. . Identify time lines and action plans for implementation. . Decide approach for selection of sample. (e.g. scientific random, modified random) . Design and implement training sessions for those involved in data collection (as appropriate).	. Who will design the instruments? (e.g. questionnaires and interview guides) . How will the data be processed? . Will the instrument be pre-tested and how? . What time is needed to revise instruments after the pilot test? . What time is needed to get instruments ready for distribution? (e.g. print, collate, staple, address, stuff envelopes, etc.) . Will self-addressed, stamped envelopes be used? . How will we distribute questionnaires: drop off, pick up, mail out? . What forms will be used to collect consistent data from interviews?

A NEEDS ASSESSMENT MODEL

ASSESSMENT		
STEPS	TASKS	QUESTIONS TO ASK
COLLECT (continued)		. What is a reasonable turnaround time between distribution and collection of data? . When are the results needed? . How will the data be compiled? . Do we need to enlist volunteers and will training be required?
ANALYZE	. Identify methods and procedures for organization and analysis of data. . Identify how the results will be used.	. What procedure will be used to tally the information? (quantitative data) . What procedure will be used to analyze the open ended questions and categorize the responses? (qualitative data) . What resources should be utilized to assist with analysis? . What computer analysis is appropriate?

A NEEDS ASSESSMENT MODEL

ASSESSMENT		
STEPS	TASKS	QUESTIONS TO ASK
	. Clarify who is the reader, the intended audience for the report.	. What should the report include and who is it intended for?
	. Develop a plan for preparing and disseminating the results of the needs assessment.	. What emphasis or thrust should the report take? What is the tone, length etc.?
	. Write a report.	. Who will be involved in the critique of the draft?
U S E	. Discuss Report with Advisory Group and obtain approval.	. What time is necessary to write the report?
	. Disengage or bring closure to Advisory Group.	. What is the deadline for final distribution?
	. ACT ON THE RECOMMENDATIONS ARISING FROM THE NEEDS ASSESSMENT. (FOLLOW UP WITH ACTIONS - DO SOMETHING!)	

SECTION III: PLANNING AND CONDUCTING A COMMUNITY NEEDS ASSESSMENT OF SENIOR POPULATIONS

PHASE ONE - PREASSESSMENT

The major focus of the initial planning phase is to define and appraise. It is characterized by tasks such as identifying the membership of the advisory committee and clarifying the purpose and objectives of the study, target populations and appropriate methodology.

1. Selecting an Advisory Committee

This is an important first task in planning a community needs assessment. It is helpful to select individuals who are interested in the study topic and who bring with them a variety of background and experience. A multi-disciplinary group knowledgeable about seniors needs and issues in relation to health, education, social services and community resources would constitute a balanced mix of individuals. The target population (seniors) should be well represented by individuals who are quite active in the community but can also represent the "unaffiliated senior".

Generally the roles expected of this type of committee are to:

1. Help narrow or focus the objectives and target populations,
2. Identify sources of data and appropriate methodology,
3. Contribute ideas and suggestions,
4. Critique all materials (e.g. data collection instruments, results).

The number of people selected should be large enough to be representative of the community yet small enough to facilitate group discussion and decision making (between 6-12 people).

The contribution of an advisory committee can be a strong asset in planning and conducting a community needs assessment. The challenge for the college planner is to design a structure and approach that will allow for creative and productive input from the committee. The following sample planning guide for an advisory committee may be useful in "getting started".

GUIDE TO WORKING WITH THE ADVISORY GROUP

THINGS TO CONSIDER	IDENTIFIED TASKS	PROCESSES/APPROACHES
Composition and Selection: . Will it be made up of experts, lay persons or a combination of both? How will membership be determined? What are the strengths each person may bring to the functioning of the group? Purpose: . Will the group be formed for the purpose of information collection, planning, advising, problem resolution, decision making, building support, creating public awareness, etc.? Direction: . Will there be a beginning and an end to the group's responsibilities? How will the length of members' service be determined? Method of Operation: . Will there be regular and frequent meetings, occasional meetings, conference telephone calls or a combination? Who will assume leadership? How will recommended actions or plans be implemented?	. Select committee members. . Send letter of introduction and agenda. . Identify focus of the study. . Clarify study questions. . Identify target audiences (Study group(s)). . Identify appropriate methodology for major target group (seniors). . Review/critique design and implementation plan. . Discuss resource data findings to date. . Advise methodology for other target groups involved in caring or assisting roles with seniors.	. Introduce group members. . Set climate. . Clarify purpose and objective of study. . Introduce Needs Assessment Process, e.g. definition, phases, questions, guidelines (flipchart). . Give overview of on-going data to date, summary of recent findings, community surveys, key interviews, etc. (flip-chart). . Facilitate group discussion, add to overview data. . Direct group members to outline their perception of the study focus and target audience. Record data on flip-chart and priorize. . Utilize expertise of committee members on an individual basis to discuss the planning and implementation in more detail. . Send developed materials to committee members prior to second meeting for critique, e.g. design and implementation plan. . Facilitate discussion. Identify key concerns and obtain advice on methodology and resources. . Present on-going data on target populations as it becomes available.

GUIDE TO WORKING WITH THE ADVISORY GROUP

continued

THINGS TO CONSIDER	IDENTIFIED TASKS	PROCESSES/APPROACHES
Motivation and Reward: . How will participants be rewarded for their input? How will their interest in group tasks be developed and retained?	. React to draft materials - written report. . Augment recommendations. . Priorize recommendations. . Develop a cooperative Community Action Plan for the future.	. Send analysis of data and draft summary and recommendations prior to meetings. . Review key points; facilitate discussion of materials. . Closure - a warm and grateful thank you! Informal and formal (letter).

2. Developing a Conceptual Design

Probably the most challenging task for the college planner is to quickly and creatively develop a plan for the conceptual design and implementation of the study. This conceptualizing is critical but must be kept in perspective since time is of the essence. Some pitfalls in this phase relate to spending too little or too much time on design. It's possible to conceptualize at length, to the point of never getting out the door or to be premature in the implementation phase without having a clear idea and path in terms of study questions, varied methodology and well-developed instruments.

The design should include study questions, clear descriptions of the target populations and possible methodological approaches. Studying a senior population is special in that seniors represent a very diverse group of individuals, so it is particularly important to be clear on the conceptual categories used to define and describe the senior population. It is helpful to include as many as possible of the target populations that are involved directly or indirectly in a caring or assisting role with seniors, since this focus would most likely yield comprehensive data and provide a composite picture of seniors in the community.

An example of a study design used by Camosun College is described below. This design is not meant to be all inclusive but may provide planners with some helpful ideas or suggestions in this first critical phase of planning and development.

DESIGN OF NEEDS ASSESSMENT - PHASE ONE

STUDY QUESTIONS	IDENTIFIED TARGET GROUPS	METHODOLOGY
What role can the College play in more actively serving the needs of seniors in the community?	SENIORS **Group A:** people who are generally active and motivated. They are mobile, mentally alert and generally avail themselves of College and community services. They have been studied a good deal. **Group B:** people who are housebound or shut in for a variety of reasons, who differ from Group A in having less affiliation or participation, motivation and mobility. They may feel isolated and lonely. They may be physically disabled and care receivers in a home setting. This group is generally under served in terms of utilizing College services. Few studies have addressed the educational needs of this group.	. Questionnaires . Interviews . Group Discussions . Observations . Records/reports . Key Consultants . Open Forum

* See Appendix I - Guide To Selecting An Appropriate Methodology

DESIGN OF NEEDS ASSESSMENT PHASE ONE

continued

STUDY QUESTIONS	IDENTIFIED TARGET GROUPS	METHODOLOGY
What role can the College play in more actively serving the needs of family members who assist and care for the senior(s) in the home set ting? **What are the educational or learning needs and interests of family members who help and care for a spouse, elderly parent or relative in the home setting?** **What are the learning or training needs of home support workers who assist and care for the Elderly in the Home Setting?** **What are the training needs of Volunteers who assist Seniors in Institution and Community settings?**	Family Members Group A: people less than 65 years of age, often women, and providing care and assistance to aged parents or relatives. These people often feel caught "in between" the demands and responsibilities of their own family (spouse, children) and the needs of their dependent parents or older relatives. Group B: people 65 and older who are assisting or caring for their dependent spouse. They are often in a primary caregiving role. Home Support Workers Individuals employed as home support workers (homemakers) by a Home Support Service Agency. These people care for and assist the elderly client in the home setting. Volunteers Individuals who hold positions in volunteer agencies in the community. They have leadership or coordinator roles and responsibilities for volunteers who care and assist the elderly in hospital and community agencies.	. Questionnaires . Interviews . Open line/Talk show (was considered) . Questionnaire . Interviews . Discussions . Group Discussion . Questionnaire . Interviews

PHASE TWO - ASSESSMENT

The major focus of this phase is to collect, analyze, and utilize the data. It is characterized by designing and implementing data collection techniques, analyzing the data, and writing the report. The successful implementation of this phase requires a good conceptual design, detailed planning, priorizing, time management, and ongoing administrative and clerical support.

To assist the college planner in this phase a sample design plan for the implementation is suggested, with a time-line/planning calendar.

DESIGN OF NEEDS ASSESSMENT- PHASE TWO

TARGET GROUP	ACTION	COMPLETION DATE
I **Seniors Group A**	. Design questionnaire utilizing resources of advisory committee, interviews with seniors, past studies, etc. . Pilot test questionnaire with a representative sample of Group A. . Revise questionnaire. Print copies for distribution. . Arrange for article in local newspaper describing the study and inviting seniors to call in. Interview by telephone. Mail questionnaire. . Distribute questionnaires to Church groups, seniors' activity centres, volunteer groups, recreation centres. . Conduct an open forum at local seniors' activity centre.	
Seniors Group B	. Consult/discuss with Seniors' groups, Senior Citizen Counsellors, Seniors' activity resource groups. . Revise original questionnaire for Group A. (Same questionnaire as in Group I). . Distribute questionnaire to seniors who are clients of Home Support Service Agency. Randomly sample seniors. . Distribute questionnaire to volunteers at Seniors Centre who will collect information from seniors who are shut-in. The questionnaire will be discussed by telephone. . Interview selected people who are patients of physicians in the community and "fit" Group B criteria. . Conduct an open forum at a Seniors' Centre (anticipated audience will be a combination of Group A and B). . Distribute Seniors' Questionnaires to Church Groups.	

DESIGN OF NEEDS ASSESSMENT - PHASE TWO

continued

TARGET GROUP	ACTION	COMPLETION DATE
II **Family Members Group A**	. Design a questionnaire. Consult with advisory committee regarding appropriate methodology. . Design semi-structured interview guide.	
Family Members Group B	. Interview family members who are related to the senior sample in Group B. (Physicians contact). . Interview family members who attend the support group service offered through Seniors Centre. . Attend Community Workshop for Family members. Discuss and ask for participation. Design a letter of introduction and participation form.	
III **Home Support Workers**	. Design a questionnaire. Print copies for distribution. . Distribute questionnaire to Homemaker Services in the Community. . Distribute questionnaire to class list; those who attended continuing education courses for Homemakers at College.	
IV **Volunteers**	. Design semi-structured interview guide. . Interview key people involved with volunteers, e.g. Coordinators of Volunteer Services, Health Care and Community agencies. . Consult with advisory group. . Research local studies regarding training needs of volunteers.	

EXAMPLE TIMELINE / PLANNING CALENDAR FOR PLANNING AND CONDUCTING A COMMUNITY NEEDS ASSESSMENT - PHASE ONE AND TWO

WEEK 1	Literature Search Review Needs Assessment
WEEK 2	Select advisory committee. Interview community leaders and resource people relevant to the study. Identify recent surveys and studies.
WEEK 3	Identify Community resources and services. Interview community resource people. Design plan for advisory committee.
WEEK 4	Analyze data to date (past studies, research). Meet with Advisory Committee. Clarify focus of study, target groups to be studied and methodology.
WEEK 5	Develop a design for phase one. Design a plan for marketing and advertising. Initiate media coverage. Design Seniors' questionnaire.
WEEK 6	Design plan for implementation (draft). Pilot test Seniors' questionnaire. Meet with individual advisory committee members regarding plan for design and implementation.
WEEK 7	Revise Seniors' questionnaire. Design final plan for implementation. Follow up on media coverage. Meet with Volunteers, representatives from Seniors' Centres, Senior Citizen Counsellors, etc. Distribute questionnaire to sample Group A seniors.

PREASSESSMENT ASSESSMENT

WEEK 8	Design questionnaire for Home Support Workers. Meet with community agencies and services relating to seniors.
WEEK 9	Meet with Home Support Workers. Distribute questionnaire to Homemaker agencies. Design interview guide for family members.
WEEK 10	Distribute Seniors' questionnaire sample Group B. Design materials for open forum. Arrange open forum media coverage, radio, T.V. and newspaper. Interview family members.
WEEK 11	Tabulate findings of Home Support Workers workers and Seniors Group A as it becomes available. Design interview guide and questionnaire for Volunteers. Meet with advisory committee, critique plan and implementation to date. Interview family members and representatives from volunteer agencies.
WEEK 12	Conduct open forum. Liaise with Computer Services - Develop plan for Data Analysis. Distribute Seniors' questionnaires to sample Groups A and B. Interview family members and volunteer agency representatives.
WEEK 13	Ongoing consultation with community resource people and advisory committee.
WEEK 14	Ongoing data collection. Initiate data analysis (quantitative) of Seniors and Home Support Workers.
WEEK 15	Ongoing data collection. Initiate data analysis (quantitative) of Seniors and Home Support Workers.
WEEK 16 17 18 19	Complete data analysis, content analysis from interviews, computer analysis of quantitative data. Write draft report.
WEEK 20	Meet with advisory committee. Finalize report and recommendations for action.

SECTION IV: PRACTICAL POINTS: A PLANNER'S PERSPECTIVE

SECTION IV: PRACTICAL POINTS: A PLANNER'S PERSPECTIVE

Some of the "learnings" from conducting a community needs assessment are discussed below as they may be of particular value to other college planners.

I. Know Your Target Population

This point is especially true of seniors for they represent a minority group, many of whom are not visible, do not utilize college services or do not make their needs or wishes known to the college. Selecting an advisory group that can effectively represent seniors in terms of their social, recreational, health, and educational needs and interests is important. Since seniors are so diversified, it is helpful to define and describe clearly the conceptual categories that narrow and accurately represent the group of seniors you wish to study. For example, if you were interested in establishing a seniors' learning centre that offered a day care component or service, you would probably survey housebound or shut-in seniors to ascertain if this service would be of benefit to them.

Since it is difficult to get a composite picture of such a heterogeneous group as seniors represent, identify other target populations that relate to seniors in some way and can contribute valuable data. These may be individuals who have a caring or assisting role with seniors, such as family members, volunteers, professional or paraprofessional caregivers (e.g. spouses, nurses, home support workers).

II. Be Sensitive to the Special Needs of Seniors

Society holds many misconceptions about aging and the older adult Educational institutions must respond positively with creative and concerted efforts to meet the needs of seniors. Seniors have basic needs to achieve, to be intellectually and socially stimulated, and to be valued. Seniors today have a higher level of formal education than previous generations.

Seniors have a wealth of life experiences to share and a need and interest to be involved as active members of society. They do not want to be studied like some biological experiment. Conducting a community needs assessment with a scientific research approach would only alienate seniors. This particular population responds favourably to methodological approaches involving group discussions, open forums, interviews and questionnaires.

Seniors have physical, financial, and psychological barriers to learning that are unique to this age group. It is helpful to assess what these barriers are. For example, attitudes toward learning, time, and costs, may vary according to the community. Questions that tap into a senior's experiences or that involve individuals in idea generation or brainstorming are valued by this group.

Every "community of seniors" is different. For example, the word "senior" may be quite appropriate in one setting but can take on a negative connotation in another. Take some time to check this out in your community. Perhaps words like older adults, senior adults, or retirees are more suitable.

Vision and hearing problems are common physical effects of aging. College planners can be sensitive to these special needs by using microphones or speaking clearly, with good voice projection in meetings and by using large, well-spaced, typed print or capitals in all written materials.

Conducting a needs assessment of a senior population is like getting to the heart of the community. It helps to get out of the office and into the community, to meet seniors in activity centres, volunteer agencies, malls, churches. Even a brief 'senior on the street' interview can be invaluable. When seniors see that a college planner is genuinely interested in finding out their needs, they will contribute beyond the call of duty. In addition to gathering valuable data, the public relations of the college are greatly enhanced. Since time is more flexible for the senior, it is important for the planner to moderate the community visits with the realities of tight time schedules. Mailed questionnaires, group discussions, forums, and telephone interviews are efficient and effective methods to use in data collection.

III. Problems, Pitfalls and Successes

Some helpful "do's and don't" are included here to assist planners in conducting a community needs assessment of senior populations.

1. Select a variety of target populations to study and use a number of different methodological approaches to collect the data. (These strategies contributed a comprehensive and composite perspective of seniors' needs in the urban and rural researched communities in this study.)

2. Use "research rigor" in selecting the sample size and pilot testing the data collection instrument(s).

3. Consider a variety of approaches to data collection from housebound seniors. (Questionnaires and telephone interviews used in the Camosun College study were not well received by this sample group.)

4. Consider a community forum similar to the one used by Camosun College. (This approach has merit in small and large communities; it is well received by seniors and a valuable source of data.)

5. Use interviews as a major data collection method in small communities. (This method was very suitable for North Island College since the resource persons could be easily identified and interviewed within the time constraints of the study.)

III. Problems, Pitfalls and Successes (cont'd)

6. Distribute questionnaires through a direct mail out approach using self-addressed, stamped envelopes. (A drop off - pick up method of delivery was used by North Island College for the Seniors' questionnaire. This method was not considered the best choice as the response rate was quite disappointing.)

7. Keep in mind the length of the questionnaires. The seniors' questionnaire was 5 pages in length. Some seniors felt this was "too much paper". A shorter version may be worth considering.

8. Do not plan to collect data during holiday seasons. December was the key month for data collection for these studies and, in retrospect, not suitable.

9. Be realistic about time-lines and expectations. Even with detailed planning guides, time ran out for the college planners. Add 20-30% onto any time-line plan in order to accommodate the normal "glitches".

10. Do not take on the entire project as a "one person challenge". (Even with the expertise and cooperative efforts of an advisory committee, a college administrator and clerical support team, the magnitude of the study was too great for one project coordinator to handle. Hire and train additional persons to assist in the data collection and analysis.)

SECTION V: SUMMARY

SUMMARY

This handbook is intended as a practical guide to developing and conducting a community needs assessment for senior populations. It should have particular relevance since it was based on the actual "field experiences" of college planners who conducted a community needs assessment of their senior population in an urban and rural setting.

The needs assessment framework presented here is one that served as a "generic model" in the study. This model is then applied specifically to the phases and procedures of planning, conducting and analysing a community needs assessment of senior populations. Practical points to consider, pitfalls and problems relevant to conducting a seniors' needs assessment are presented, as well as tips on designing questionnaires and selecting the appropriate methodology.

The specific reports from Camosun and North Island Colleges entitled "Services For Seniors: Community Needs Assessment" are available upon request.

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APPENDIX I

GUIDE TO SELECTING AN APPROPRIATE METHODOLOGY

GUIDE TO SELECTING AN APPROPRIATE METHODOLOGY

QUESTIONNAIRES	ADVANTAGES	DISADVANTAGES
. may be in the form of surveys or polls of a random or stratified sample of respondents, or, enumeration of an entire "population". . can use a variety of question formats: open-ended, projective, forced-choice, priority-ranking. . can take alternative forms such as Q-sorts, or slip-sorts, rating scales either pre-designed or self-generated by respondent(s). . may be mailed, self-administered or group administered or included in the conduct of an interview.	. can reach a large number of people in a short time. . are relatively inexpensive. . give opportunity of expression without fear of embarrassment. . yield data easily summarized and reported (translatable for data processing). . personnel can be trained easily to perform functions of mailing, and recording. . adaptable to a wide variety of situations and can be used to measure factual or attitudinal data.	. make little provision for free expression of unanticipated responses. . require substantial time (and technical skills, especially in survey mode) for development of effective instruments. . are of limited utility in getting at causes of problems or possible solutions. . suffer low return rates (mailed) grudging responses or unintended and/or inappropriate respondents. . samples only a single time frame, therefore should be repeated to determine trends.

KEY INFORMANT	ADVANTAGES	DISADVANTAGES
. secures information from those persons who by virtue of their formal or informal standing, are in good position to know what the educational needs of a particular group are: a) board chairman b) related service providers - public officals, church leaders, members of professional associations c) individuals from the service population d) longtime residents . once identified, data can be gathered from these consultants by using techniques such as interviews, group discussions, questionnaires.	. is relatively simple and inexpensive to conduct. . permits input and interaction of a number of individuals, each with his or her own perspectives of the needs of the area, discipline, group, etc. . establishes and strengthens lines of communication between participants in the process. . provides depth of information concerning causes or reasons. . good for obtaining a deeper knowledge of minority viewpoints.	. carries a built-in bias, since it is based on views of those who tend to see needs from their own individual or organizational perspective. . may result in only a partial picture of educational needs due to the typically non-representative nature (in a statistical sense) of a key informant group; the perspective of those who are less visible may be overlooked.

GUIDE TO SELECTING AN APPROPRIATE METHODOLOGY

INTERVIEWS	ADVANTAGES	DISADVANTAGES
. can be formal or casual, structured or unstructured, or somewhere in between. . may be used with a sample of particular groups (board, staff, committee) or conducted with everyone concerned. . can be done in person, by phone, at the work site, or away from it.	. are adept at revealing feelings, causes of and possible problems which the person is facing (or anticipates). . provide maximum opportunity for the person to represent himself spontaneously on his own terms (especially when conducted in an open-ended, non-directive manner).	. are usually time-consuming. . can be difficult to analyze and quantify results (especially from unstructured formats). . unless the interviewer is skillful, the person can easily be made to feel self-conscious. . rely for success on a skillful interviewer who can generate data without making people feel self-conscious, suspicious, etc.

GROUP DISCUSSION	ADVANTAGES	DISADVANTAGES
. resemble face-to-face interview technique, e.g. structured or unstructured, formal, or somewhere in between. . can be focused on job (role) analysis, group problem analysis, group goal setting, or any number of group tasks or themes, e.g. "leadership training needs of the board." . uses one or several of the familiar group facilitating techniques, brainstorming, nominal group process, force-fields, concensus rankings, organizational mirroring, simulation and sculpting.	. permits on-the-spot synthesis of different viewpoints. . builds support for the particular service response that is ultimately decided on. . helps participants to become better problem analysts, better listeners, etc.	. is time-consuming (therefore initially expensive) both for the consultant and the agency. . can produce data that are difficult to synthesize and quantify (more a problem with the less structured techniques).

GUIDE TO SELECTING AN APPROPRIATE METHODOLOGY

PARTICIPANT OBSERVATION	ADVANTAGES	DISADVANTAGES
. observers' aim is to see the world through the eyes of the subjects. . observation and documentation must be carried out systematically so that the information obtained is free of bias.	. setting is natural, unstructured, and flexible. . investigator may make his/her identity known to the subjects, or researcher may keep identity a secret. . extended time duration may add to trust level and depth of understanding. . can be combined with other techniques such as survey, key informant, community impressions, nominal group process, thereby adding to data quality. . useful in studying over long time period. . observations can be organized in advance to narrow the problem and make data more quantifiable, or the opposite approach may be taken where no preconceived restrictions are placed on observations. . a small number of people are studied to obtain in-depth information. . useful for studying a "small culture" - particular neighbourhood, an ethnic group, the fire department, planning commission, factory assembly line, ranchers, migrant laborers, business organization.	. natural environment means the investigator has less control over the situation. . if group are aware they are being observed, resulting behavior may be affected. . extensive amount of time required may not be practical. . observations may not be valid for entire population unless a plan for representativeness is developed. . known observers may disrupt normal ways of living and interacting. . training in observation skills may be essential. . selective perception by observers may bias or limit information obtained. . observers may lose objectivity as a result of becoming involved. . may yield a massive amount of data which is difficult to organize or quantify. . does not usually yield a large population sample from which broad generalizations can be drawn.

GUIDE TO SELECTING AN APPROPRIATE METHODOLOGY

RECORDS, REPORTS, RESEARCH	ADVANTAGES	DISADVANTAGES
. can consist of census and vital statistic records, organization charts, planning documents, policy manuals, audits and budget reports, surveys, studies. . the information obtained is free of bias and relevant to the focus of the study.	. provide excellent clues to trouble spots. . provide objective evidence of the results of problems within the agency or group. . data available on a wide variety of characteristics, e.g. population, housing, social housing, transportation, etc. . often available at minimal cost through libraries, agencies.	. causes of problems or possible solutions often do not show up. . carries perspective that generally reflects the past situation rather than the current one (or recent changes). . need a skilled data analyst if clear patterns and trends are to emerge from such technical and diffuse raw data. . may not reveal individual values, beliefs or reasons.

NOMINAL GROUP PROCESS	ADVANTANGES	DISADVANTAGES
. a structured problem solving or idea generating strategy in which individual ideas are gathered and combined in a face-to-face, non-threatening, situation. . can be used in health, social service, and education fields, as well as in industry and government. . involves individual recording of ideas, round robin feed-back, listing of all ideas on flipchart, discussion of ideas, priorizing by silent ballot and group discussion.	. if well-organized in advance, a heterogeneous group can move toward definite group conclusions. . can be used to expand the data obtained from surveys or existing documents, or can be used to generate a more specific survey. . motivates all participants to get involved because they sense they are personally affected. . generates many ideas in a short period of time; allows for a full range of individual thoughts and concerns. . a good way to obtain input from people of different backgrounds and experiences. . gives all participants an equal opportunity to express opinions and ideas in a non-threatening setting. . allows individual generation of ideas without suppression by any dominant group member. . stimulates creative thinking and effective dialogue. . allows for clarification of ideas.	. requires a skilled leader. . may be extremely difficult to implement with large audiences unless advance preparation has taken place to train group facilitators and divide participants into groups of 6-10 members. . process may appear rigid if group leader does not show flexibility - encourage agenda building, and show respect for all ideas and concerns. . may be some overlap of ideas due to unclear wording or inadequate group discussion. . "knowledgeable" individuals selected to participate may not represent all community subgroups. . assertive personalities may dominate unless leadership skills are exercised. . may not be a sufficient source of data in itself; may require follow-up survey observations, or documentary analysis. . inappropriate technique for routine meetings, bargaining, negotiation, or coordination.

APPENDIX II

GUIDELINES TO DESIGNING A QUESTIONNAIRE

Guidelines to Designing A Seniors' Questionnaire

The questionnaire is an instrument of survey research and the design of a questionnaire is considered a complex science. The needs assessor must consider desired rate of return, sample size, accuracy of information required and the length of the questionnaire in the initial design phase. Some tips to design are included below:

1) Identify your target group clearly.

2) Decide on your approach to the respondent. Design a letter or paragraph of introduction that states the purpose of the study, the procedure or instructions involved. Confidentiality and anonymity, how the data will be used, the role of the College and the target population are issues that have to be covered.

3) Phrase questions so that they are easily read (visually) and understood by the respondents. Use large print for Seniors; (this is important) and 1 1/2 or double spacing. Capitals for the entire text are a good idea.

4) Construct only essential questions. Watch out for the nice to know but not necessary questions.

5) Try to keep the questionnaire as short as possible, 5-6 pages maximum, preferably shorter. Colour code the questionnaire to facilitate keeping groups on target during discussion or to highlight specific sections of the questionnaire.

6) Make clear how many answers you want to each question, e.g. list one ... specify at least two ... you may answer more than one ... etc.

7) Ask the right type of question so you will receive the right type of data; e.g. "Do you favour a pre-retirement education program for seniors?" is different from "Would you attend a pre-retirement program for seniors?"

8) Provide the target audience with enough information so they can respond to the questions. For example, if you want to elicit information about the desire for a seniors' learning centre or senior volunteer programs, then you must familiarize the audience with the concept so they will be able to respond appropriately.

9) Include both open-ended and closed-ended questions. Open-ended questions attempt to elicit opinions, ideas and recommendations; at least one open-ended question should be included.

Example of Open-ended Question:

What subject or topics are you most interested in learning about? Are there particular types of programs or courses that the College could offer that would encourage you to attend?

Closed-ended questions attempt to identify a response to selected alternatives.

Example of Closed-ended Questions:

If I attended the College I would prefer to take:

a) regular courses toward high school graduation

b) regular courses toward a certificate, diploma degree

c) regular courses but not for credit (audit)

d) general interest courses

10) Consider questions that limit the number of responses. For example - identify eight possible topics you would be able to offer Seniors, then allow them to identify only two other topics.

11) Cluster questions according to themes and use "headers" to draw attention to the theme, e.g.

A. Background information

B. Enrollment Concerns

C. Course for Seniors

12) Pilot test the questionnaire with a representative number of seniors who match your defined senior target population. This will reduce bias in question wording and sequencing and enhance the validity and reliability.

APPENDIX III

GUIDELINES FOR ESTABLISHING AN ADVISORY GROUP

Individuals were selected to serve on the advisory committee that were interested in the study and knowledgeable about seniors' needs and issues in relation to health, education, social services and community resources. The advisory committee memberships of Camosun College and North Island College are included here to serve as examples to assist other college planners in selecting a representativegroup from their communities.

CAMOSUN COLLEGE ADVISORY COMMITTEE FOR SENIORS PROJECT

AGENCY/ASSOCIATION

Administrator,
Fernwood Home Support Services.

Physician,
James Bay Medical Clinic.

Program Coordinator,
University Extension.

Chairman,
Information and Referral,
Seniors Serving Seniors.

Professor,
School of Nursing,
University of Victoria and Juan de Fuca Hospitals.

Chairman,
Education Committee,
Victoria Gerontology Association.

Executive Director,
Long Term Care and Rehabilitation,
Greater Victoria Hospital Society.

Representative,
Long Term Care Citizens Association and Victoria Council of Churches.

Manager of Long Term Care Programs,
Capital Regional District.

Project Coordinator,
Camosun College.

Director,
Health and Human Services,
Camosun College.

NORTH ISLAND ADVISORY COMMITTEE

AGENCY/ASSOCIATION

Ministry of Health,
Long Term Care Administrator for the Comox Valley.

Administrator,
Glacier View Intermediate Care Facility.

Chamber of Commerce (Member), and Comox Valley Gerontology Association.

Seniors' Counsellor,
Member of Comox Valley Gerontology Association.

Senior Medical Advisor,
Comox Valley Gerontology Association.

Director of Programs,
North Island College.

Project Researcher,
North Island College.

APPENDIX IV

CASE STUDIES

CAMOSUN COLLEGE
AND
NORTH ISLAND COLLEGE

CASE STUDY - CAMOSUN COLLEGE

In the Fall of 1986, Camosun College conducted an Educational Needs Assessment of Seniors for the purpose of determining what role the College could play in better meeting seniors needs in the community. The survey was titled Services for Seniors: Community Needs Assessment and was comprehensive in that it surveyed seniors as well as individuals and groups who were involved directly in a caring or assisting role with seniors.

OBJECTIVES: The purposes of the community needs assessment were:

1) To identify existing resources and services for seniors and their families throughout the Capital Regional District.

2) To determine the need for coordination of existing services, e.g., through "one stop" delivery of information, counselling and referral services in easily accessible locations.

3) To establish demand and possible delivery systems for educational programs for seniors, health care workers, volunteers, non-profit groups and agencies, and the general public.

4) To explore the feasibility of providing a Seniors' Learning Centre on Lansdowne Campus at Camosun College. This initiative might combine services to the active elderly with practical training for students in Health and Human Services programs. It could also provide seniors with ready access to a wide variety of credit and general interest courses.

ADVISORY COMMITTEE

The study began with the selection of an eight member advisory committee. This multidisciplinary group was knowledgeable about seniors needs and issues in relation to health, education, social services and community resources. The committee met four times to offer guidance and direction in the design, implementation and evaluation of the study. The committee also affirmed the recommendations included in the final report.

TARGET POPULATIONS

The identified target groups surveyed consisted of four separate samples.

SENIORS: The major study group included 2 sub-groups, namely:

Group A: active, mobile, motivated seniors who generally had utilized college and community services and had been surveyed in the past in other studies; and Group B: housebound or shut-in seniors who were isolated, perhaps physically disabled, less motivated and active and who did not utilize college services. Little data was available from past studies on this particular group.

HOME SUPPORT WORKERS: Individuals employed by Home Support Service Agencies and responsible for caring or assisting elderly clients in the home setting.

FAMILY MEMBERS: Individuals of 65 years of age or less holding a caring or assisting role with an aged family member (parent, aunt, etc.). In addition to this caregiver role they often had their own family responsibilities with spouse and children to consider.

A second group of family members were individuals 65 years and older who often had a primary role in caring for or assisting their dependent spouses.

VOLUNTEERS: Individuals holding positions in volunteer agencies coordinating and directing volunteers within their agencies who were responsible for caring for or assisting elderly persons in hospital and community settings.

DATA COLLECTION: A variety of methodological approaches were used in the data collection process. The data collection period took approximately 3 1/2 months to complete.

QUESTIONNAIRES: This was the major data collection instrument used to collect data from seniors (Group A and B) and the Home Support Workers. Instruments were pre-tested prior to distribution. Most questionnaires were distributed by direct mail out, using self-addressed envelopes with postage pre-paid.

INTERVIEWS: Individual interviews were conducted with family members and volunteer agency representatives. Group and individual interviews were conducted to obtain data from seniors groups or community members who were knowledgeable about the needs and issues of seniors. Telephone interviews were also used to gather data from seniors who called in response to college advertising. A semi-structured interview guide was used to collect data.

COMMUNITY FORUM: Seniors were invited to participate in an open forum conducted by the Project Coordinator at a downtown senior citizens' centre. Discussion was focused and facilitated by using information and idea sheets. Well-planned advertising, good community cooperation and free refreshments all contributed to a successful event.

DATA CODING AND ANALYSIS: Following the data collection phase the raw data were examined and sorted into both qualitative and quantitative "data categories". The quantitative data from the Seniors' and Home Support Workers' Questionnaire were entered onto a VAX editor computer file. The data were analyzed using the statistical package for the Social Sciences (SPSS), an integrated system of computer programs designed for the analysis of social science data. For the purpose of this study, the common descriptive statistics were used for analysis, such as simple frequency distribution and cross tabulations.

The qualitative data were handled using content analysis; a process of discrimination, definition and classification. A system was established to classify information so as to identify and quantify ideas, themes, sequences and patterns. To facilitate data compilation and analysis, data were entered onto reference or index cards noting the theme or category, illustrative comments and the number of times the theme had appeared in the raw data.

CASE STUDY - NORTH ISLAND COLLEGE

In the Fall of 1986, North Island College conducted an Educational Needs Assessment of Seniors for the purpose of determining what role the College could play in better meeting seniors needs' in the community. The survey was titled Services for Seniors: Community Needs Assessment and was comprehensive in that it surveyed seniors as well as individuals and groups who were involved directly in a caring or assisting role with seniors.

OBJECTIVES: The purposes of the community needs assessment were:

1. To determine a demand and possible delivery systems for Educational or Recreational programs for Seniors, Health Care Workers, Home Care Workers and possibly for volunteer non-profit groups and agencies and the general public.

2. To identify existing services and the resources available for Seniors and their families in the Comox Valley.

3. To determine the need for co-ordination of existing services and resources, e.g. through a "one-stop" delivery of information, referral services and counselling opportunities in a central or more accessible location in the community.

Camosun College served as a model for North Island College for the conceptual design and implementation of the community needs assessment. North Island College "tailored" the ideas and resources to meet the special needs of its community. These commonalities and differences contributed to a unique, small community/rural perspective.

ADVISORY COMMITTEE: A seven member committee was utilized as an advisory and resource group. Several small communities were represented. Distance and time factors and territorial community perspectives sometimes need to be considered when such a group is struck to represent many communities. These issues did not present a problem in this particular study. The expertise and ideas of many individuals in addition to the advisory committee, were sought through interviews.

TARGET POPULATIONS

1. SENIORS who were active, mobile, motivated individuals involved in community activities (Group A).

2. INDIVIDUALS who provided services to seniors in the community in relation to Health, Social Services, Recreation and Education.

3. HOME SUPPORT WORKERS; individuals employed by a Home Support Service agency who cared for or assisted elderly clients in the home setting.

4. OTHER PROFESSIONAL AND PARAPROFESSIONAL HEALTH CARE WORKERS who care for and assist the elderly in a variety of health care settings. (Nurses, Long Term Care Aides)

DATA COLLECTION: Questionnaires and Interviews were the methodological approaches chosen. The data collection period took approximately 2 1/2 months.

INTERVIEWS: This was an important data collection method utilized for all the target populations. The needs assessor, a senior and long time resident of the area, was knowledgeable about the community and able to identify the key resource persons, establish credibility, and rapport with ease. A journal/diary of all interviews served as a useful record of the qualitative data gathered.

QUESTIONNAIRES: The Questionnaire method, like the interviews, proved to be a good approach to collecting data especially from the Home Support Workers in the community. Seniors were not very responsive to completing the questionnaires, so the return rate was disappointing.

DATA CODING AND ANALYSIS: Following the data collection phase the raw data were examined and sorted into both qualitative and quantitative "data categories". The quantitative data from the Senior and Home Support Workers Questionnaire were hand tabulated and analyzed. The qualitative data from the interviews were handled using a process of content analysis.

APPENDIX V

PROVINCIAL STEERING COMMITTEE

The production of this Handbook for Community College Planners was greatly assisted by the advice and guidance of a Provincial Steering Committee composed of the following persons:

SENIORS NEEDS ASSESSMENT STEERING COMMITTEE

Mrs. Gwen Lundy	Chairman, Information and Referral, Seniors Serving Seniors.
Mr. Ron Miles	Director, Arts and Human Services, Cariboo College.
Mr. John Tayless	Director or Programs, North Island College.
Mr. Jim Baker	Project Researcher, North Island College.
Mrs. Gloria Wolfson	Coordinator, Social Services, Fraser Valley College.
Dr. Hal Chalmers	Coordinator of Health Programs, Ministry of Advanced Education and Job Training.
Mr. Gary Bunney	Director, Career and Technical Programs, Ministry of Advanced Education and Job Training.
Dr. M. Neil Murphy	Director, Health and Human Services, Camosun College.
Ms. Patricia Gauchie	Project Coordinator, Camosun College.

Camosun College gratefully acknowledges the time and expertise contributed by all of these individuals to the completion of this project.

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